

## Charities form

### Deceased details

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Full name of the deceased

Plan number of the deceased

### Charity details

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Name of Charity

Address

Contact telephone number

Please confirm which regulator the charity is registered under and the registration number:

**Charity Registration Number**

**Charity Commission for England and Wales**

**Office of the Scottish Charity Regulator**

**Charity Commission for Northern Ireland**

### Lump sum payment details

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The assets, or the charity's share of the assets, will be disinvested and the cash lump sum will be transferred to the bank account specified below.

**We will arrange for you to receive your lump sum via BACS or Next Day Faster Payment**

**Please tick this box if you would like to receive the lump sum by CHAPS.**

- BACS transfers take between three and five working days, and Faster Payments will be received the next working day. CHAPS payments are same-day electronic bank transfers.
- There are no banking charges for BACS payments. CHAPS and Faster Payments are subject to a fee. These are detailed on our current schedule of fees which is available from our website [www.curtisbanks.co.uk](http://www.curtisbanks.co.uk).
- Our fees (including any international payments fee if the payment is to an overseas bank account) will be deducted from the payment before it is made. We do not have prior knowledge of any additional fees or charges you may incur from an intermediary or receiving bank and we have no responsibility in this regard.

## Charity bank details

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Please provide us with the details of the account that is to receive the payment. The account must be in the name of the charity.

**Bank or building society**

**Address**

**Account in the name(s) of**

**Account number**

**Roll number**

## Declaration

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- We request a lump sum death benefit payment to be made in line with the instructions on this form.
- We understand that you may undertake a search with a reference agency for the purposes of verifying the identity of the charity prior to paying the lump sum death benefit. To do so, the reference agency may check the details we supply against particulars on any database (public or otherwise) to which they have access. They may also use these details in the future to assist other companies for verification purposes. A record of the search will be retained as an identity search.
- We acknowledge that, in the event there are other beneficiaries, the payment of the lump sum death benefit to us may be subject to delay. Such delay may arise while the scheme administrator determines the appropriate allocation of the deceased's pension funds, particularly where other beneficiaries have not yet confirmed their preferred form of benefit, or where a beneficiary has elected to receive benefits via drawdown and the allocation of assets for that purpose is still under consideration.
- We confirm that the lump sum death benefit payment will only be used for charitable purposes.

First authorised signatory

**Signature**

**Name**

**Position**

**Date**

**Quote reference**

Second authorised signatory (If applicable)

**Signature**

**Name**

**Position**

**Date**

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0370 414 7000, or via the Relay UK service on 18001 0370 414 7000.

Curtis Banks Limited, T 0370 414 7000  
3 Temple Quay, F 0370 414 8000  
Bristol, BS1 6DZ  
curtisbanks.co.uk

**Call charges will vary. We may record and monitor calls.**

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